

**Deferred Compensation Program
Brown Bag Training Classes
2009**

Course Name	Date	Start	End	Location	Instructor
Staying the Course - Strategies for a Volatile Market	1/8/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Staying the Course - Strategies for a Volatile Market	1/15/2009	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conf Rm A	Steve Moy
Staying the Course - Strategies for a Volatile Market	1/13/2009	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Charles Lindbergh Conference Room	Peter Ng
Staying the Course - Strategies for a Volatile Market	1/13/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy
Staying the Course - Strategies for a Volatile Market	1/22/2009	10:30 PM	11:30 PM	Airport - Facilities Conf. Rm., 1401 Airport Blvd.	Peter Ng
Staying the Course - Strategies for a Volatile Market	1/22/2009	12:00 PM	1:00 PM	Old MLK Library, 170 West San Carlos St., 4th Floor Conference Room, 4th Floor Conf. Room	Steve Moy
SJDCP - What It Is and How It Works	2/5/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
SJDCP - What It Is and How It Works	2/4/2009	12:00 PM	1:00 PM	DOT - Maybury Yard, 1404 Maybury Rd. North Conference Room	Peter Ng
MorningStar Advice Online	2/10/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Gary Bozin
MorningStar Advice Online	2/12/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
MorningStar Advice Online	2/10/2009	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conf Rm A	Steve Moy
Investing 201	3/3/2009	12:00 PM	1:00 PM	City Hall - w119	Gary Bozin
Investing 201	3/3/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy
Investing 201	3/4/2009	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conf Rm A	Steve Moy
Catch-Up Provisions-Age 50/3 year Special	3/19/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Catch-Up Provisions-Age 50/3 year Special	3/17/2009	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conf Rm A	Steve Moy
Catch-Up Provisions-Age 50/3 year Special	3/17/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Gary Bozin
SJDCP Website - Account Access, Tools and Calculators	4/2/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
SJDCP Website - Account Access, Tools and Calculators	4/1/2009	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conf Rm A	Steve Moy
SJDCP Website - Account Access, Tools and Calculators	4/8/2009	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Charles Lindbergh Conference Room	Peter Ng
Identity Theft	4/15/2009	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conf Rm A	Steve Moy
Identity Theft	4/16/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Identity Theft	4/14/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy
Staying the Course - Strategies for a Volatile Market	4/30/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin

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Charting Your Own Course - SJDCP Investment Options	5/7/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Charting Your Own Course - SJDCP Investment Options	5/5/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy
Charting Your Own Course - SJDCP Investment Options	5/12/2009	12:00 PM	1:00 PM	Old MLK Library, 170 West San Carlos St., 4th Floor Conference Room, 4th Floor Conf. Room	Steve Moy
Budgeting	5/21/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Budgeting	5/19/2009	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Charles Lindbergh Conference Room	Peter Ng
Budgeting	5/19/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy
Saving for College	6/2/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy
Saving for College	6/4/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Saving for College	6/11/2009	10:30 PM	11:30 PM	Airport - Facilities Conf. Rm., 1401 Airport Blvd.	Peter Ng
Asset Allocation	6/18/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Asset Allocation	6/23/2009	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Charles Lindbergh Conference Room	Peter Ng
Asset Allocation	6/17/2009	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conf Rm A	Steve Moy
Distribution Options - When and How	7/2/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Distribution Options - When and How	7/1/2009	12:00 PM	1:00 PM	DOT - Maybury Yard, 1404 Maybury Rd. North Conference Room	Peter Ng
Distribution Options - When and How	7/1/2009	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314	Gary Bozin
Retirement Readiness	7/16/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Retirement Readiness	7/14/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy
Retirement Readiness	7/15/2009	12:00 PM	1:00 PM	Old MLK Library, 170 West San Carlos St., 4th Floor Conference Room, 4th Floor Conf. Room	Steve Moy
Retirement Income	9/3/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Retirement Income	9/2/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy
Retirement Income	9/1/2009	12:00 PM	1:00 PM	Old MLK Library, 170 West San Carlos St., 4th Floor Conference Room, 4th Floor Conf. Room	Steve Moy
Investing 101	9/15/2009	12:00 PM	1:00 PM	City Hall - w119	Gary Bozin
Investing 101	9/17/2009	10:30 PM	11:30 PM	Airport - Facilities Conf. Rm., 1401 Airport Blvd.	Peter Ng
Investing 101	9/16/2009	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conf Rm A	Steve Moy

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SJDCP Website - Account Access, Tools and Calculators	10/1/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
SJDCP Website - Account Access, Tools and Calculators	10/6/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy
SJDCP Website - Account Access, Tools and Calculators	10/8/2009	12:00 PM	1:00 PM	Old MLK Library, 170 West San Carlos St., 4th Floor Conference Room, 4th Floor Conf. Room	Gary Bozin
SJDCP Website - Account Access, Tools and Calculators	10/8/2009	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conf Rm A	Steve Moy
Retirement Planning for Women	10/15/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Retirement Planning for Women	10/20/2009	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Charles Lindbergh Conference Room	Peter Ng
Staying the Course - Strategies for a Volatile Market	11/5/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Staying the Course - Strategies for a Volatile Market	11/4/2009	12:00 PM	1:00 PM	DOT - Maybury Yard, 1404 Maybury Rd. North Conference Room	Peter Ng
Staying the Course - Strategies for a Volatile Market	11/4/2009	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314	Gary Bozin
Distribution Options - When and How	11/19/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
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Distribution Options - When and How	11/18/2009	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Charles Lindbergh Conference Room	Peter Ng
Catch-Up Provisions-Age 50/3 year Special	12/3/2009	12:00 PM	1:00 PM	City Hall - w120	Gary Bozin
Catch-Up Provisions-Age 50/3 year Special	12/1/2009	12:00 PM	1:00 PM	Old MLK Library, 170 West San Carlos St., 4th Floor Conference Room, 4th Floor Conf. Room	Steve Moy
Catch-Up Provisions-Age 50/3 year Special	12/8/2009	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Charles Lindbergh Conference Room	Peter Ng

CLASS DESCRIPTION

457 Deferred Compensation - What It Is and How It Works

How the City of San Jose Deferred Compensation Plan works. The basic concepts, rules, and regulations of 457 Governmental DC plans. The benefits of pre-tax contributions and tax-deferred growth.

Staying the Course - Strategies for a Volatile Market

Is the current status of the stock market making you feel like you're caught in the "perfect storm?" "Staying the Course" can provide you with information and options to help you stay focused and see what alternatives are available to help you continue to reach your retirement objectives.

Budgeting

Do you know where the money goes? These budgeting tips can help you make ends meet, and help you better prepare for your future.

457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special

Age 50" - This provision allows participants to make additional contributions as they approach retirement.

"Special 3 Year Catch-Up" - When your eligible; How eligibility is calculated; How the rules have changed; When you **CANNOT** use. Eligibility to deposit unused vacation and sick leave.

SJDCP Website - Account Access, Tools and Calculators

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Account Access - how to set up and access your account. Review of menu options such as; current cash values, daily unit values and interest rates.

An introduction to the Tools and Calculators available to plan participants, including; Income Wizard, Account Gateway, Determine Your Needs, Model Investment Portfolio, etc...

Retirement Readiness

Does retirement seem like an ever-moving target? Allow us to point out how smart steps today can help yo arrive better prepared for tomorrow's big day.

Deferred Compensation Distribution Options -When and How

Discussion of when and how the money in your 457 Deferred Compensation Plan is available for distribution. Review of new distribution rules.

Charting Your Own Course - SJDCP Investment Options

Gain a thorough understanding of all investment vehicles to effectively manage your portfolio. Topics include: Understanding Stock Market, Types of Mutual funds, Understanding risk vs. reward, Market Capitalization, Asset Allocation Funds, Diversification, and personal investing principles.

Morningstar Advice Online

Learn how to use the Plan's investment advisory service. Morningstar uses a goal-based approach to recommend the right investment mix for your situation.

Identity Theft

How vulnerable are you? Learn how to keep your personal information safe from those who may be up to no good.

Saving for College

Wish you knew how to save for kid's college without surcharging your other long-term goals like retirement? Allow us to give you some ideas.

Retirement Income

Before you take the plunge into retirement, better think about structuring your income. We can explain a four-step system designed to help keep your income flowing.

Investing 101

What might be preventing you from making investment decisions? We'll reveal eight common ways investors get derailed, and then explain how to get back on track.

Investing 201

Well acquainted with garden-variety investing? Here's a field guide to more sophisticated approches and ways to apply them.